

## **EXCLUSIONS**

### **DOE O 110.3A – CONFERENCE MANAGEMENT**

1. OBJECTIVES. ...
2. CANCELLATION. ...
3. APPLICABILITY. ...
  - a. Departmental Elements. ...
  - b. DOE Contractors. ...
  - c. Exclusions.

(1) This Order does not apply to the following:

- (a) DOE employees traveling to sites where work for DOE is being performed to discuss the status of that work;
  - Cannot use this exclusion because it applies to DOE employees only
- (b) formal, structured training programs (including seminars specifically held for training purposes) that have specific objectives identified to improve certain knowledge, skills, and abilities;
  - Credit given for course completion
  - Syllabus is available
  - EXAMPLE: Particle Accelerator School
- (c) contractor activities related to work not funded by DOE;
  - Only used when salary is NOT paid by DOE funds
  - Accounts receivable
  - Work for Others (Pierre Auger, SDSS, etc. when non-DOE funds are used)
- (d) meetings requiring only local travel;
  - Follow IRS rules of less than 50 miles
- e) Federal Advisory Committee meetings;
  - HEPAP meetings
  - Secretary of Energy Advisory Boards
  - Blue Ribbon Commission
  - US-PRC Joint Committee for HEPAP
- (f) contract pre-proposal, bid opening, and similar activities, including negotiations;
- (g) public hearings and associated briefings;
  - Held by Federal Agency
- (h) audits, inspections, and investigations;

- Internal audits
  - Site inspection for Snowmass meeting
  - Vendor visits to discuss work/specs/conduct tests
- (i) DOE technical/business program, project, or peer reviews;
- Use for Collaboration Meetings: Brings together researchers in support of a DOE-funded experiment (e.g. CDF). Such collaboration meetings are essential to the success of the DOE experiments
  - Inter-lab peer reviews – ISM reviews – SNS reviews
  - SAGENAP meetings (review of expenses)
  - Used when Fermilab personnel helped with Incident Reviews @ SLAC
  - Meetings held at Forrestal or Germantown
- (j) activities funded through financial assistance agreements, unless management of a DOE conference is a purpose of the Agreement; and
- Users
  - Use when grants are covering travel costs
  - Use when any other entity is paying ALL costs of a trip. (Would possibly even apply when all but local travel is covered by Fermilab funds, because those charges could be considered under Exclusion (d))
- (k) conferences for which DOE is sponsoring or co-sponsoring where the total DOE expenditure is less than \$10,000.
- “...total DOE expenditure” includes contributions and travel costs from all DOE entities (does NOT include salaries)